Research News for the U.S. Travel Industry

# TRAVEL PRINTOUT

US Travel Data Center

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## U.S. Travelers Continue Summer Vacation Travel in 1991

Seventy-seven percent of all U.S. resident adults took at least one trip of 100 miles or more away from home in the last 12 months. Of these travelers, 63 percent or 90 million people, took at least one summer vacation trip in 1991, according to the U.S. Travel Data Center's National Travel Survey (NTS).

Thirty-four percent of all U.S. adult travelers, those who took at least 1 trip of 100 miles or more in the last 12 months, took only one summer vacation trip, 24 percent indicated taking between two and four, and 5 percent took five or more trips.

The Data Center's monthly survey interviews a national probability sample of 1,500 U.S. adults.

"A substantial number of travelers who did not take a summer vacation trip in 1991 were 50 years or older and retired," said Suzanne Cook, executive director of the U.S. Travel Data Center. "Traditionally, these travelers are more inclined to take their vacation trips in the off-season periods to avoid the congestion usually associated with the summer season."

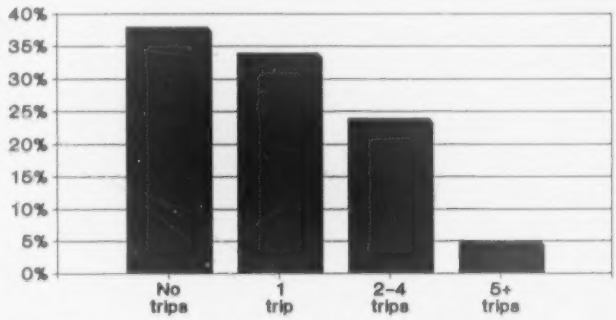
U.S. adult travelers enjoyed a variety of travel services during their summer vacation trip. Fifty-one percent stayed in a hotel or motel, 26 percent visited attractions and theme parks and 32 percent visited national or state parks.

Adults in single households were more likely to use airline services, trains, rental cars and travel agents during a summer vacation trip in 1991, compared to other types of households.

Theme parks and attractions were more popular among households with children, compared to single and married couple households without children. In addition, married couples were more likely to stay in hotels or motels.

Residents of some regions seemed to prefer some travel services over others, according to the NTS. Mid-Atlantic residents used airlines and rental cars more than any other region, East-South Central residents used hotels and motels more often, West-South Central residents were more inclined to visit attractions and theme parks and West-North Central residents were more likely to visit state and national parks.

### Number of Summer Vacation Trips (U.S. Adult Travelers)




Source: U.S. Travel Data Center

The U.S. Travel Data Center sponsors and conducts the National Travel Survey (NTS), a monthly telephone survey with a national probability sample of 1,500 U.S. adults, which measures traveler volume and behavior, is available for use by travel suppliers and other companies.

The NTS was developed in 1979 in response to a demand for reliable, comprehensive indicators of U.S. travel activity.

With an annual sampling of 18,000, this is the longest running monthly telephone survey that continuously measures the trip characteristics and demographics of American travelers.

The Data Center is the nationally recognized organization that has the capability of focusing solely on the U.S. adult traveler market. This gives the Data Center the flexibility to ask a variety of questions that might be of interest to the travel industry.

For additional information contact Elizabeth Stewart, manager of market research at (202) 293-1040.

INSIDE:
- More Than 5.7 Million U.S. Travelers Go Overseas in 1990
- 1992 Travel Outlook Forum
- Frequent Business Travelers
- Travel Review Conference

# Cost of Travel Increases Slightly in October

After decreasing in September, the cost of travel in the United States increased less than 1 percent in October. The cost of travel in October increased 0.4 percent over the previous month and increased 3.1 percent over the past 12 months, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 145.1 (1982 - 84 = 100) during October.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.2 percent in October and rose to 137.4.

**Travel Price Index and Components**

| October 1991<br>TPI Component | Monthly % Change<br>September 1991 to<br>October 1991 | Annual % Change<br>October 1990 to<br>October 1991 |
|---|---|---|
| Transportation | -2.6 | -11.3 |
| Airline Fares | -3.8 | -5.7 |
| Other Intercity Trans. | 0.9 | 3.4 |
| Intracity Public Trans. | 0.2 | 4.4 |
| Motor Fuel | -1.5 | -17.3 |
| Lodging | 2.3 | 13.8 |
| Food and Beverages | | |
| Away From Home | 0.6 | 3.8 |
| Entertainment | -0.1 | 6.0 |
| TRAVEL PRICE INDEX | 0.4 | 3.1 |
| CONSUMER PRICE INDEX | 0.2 | 2.9 |

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Even though the overall cost of travel increased in October, the transportation component of the TPI decreased more than 2 percent. Transportation costs also dropped more than 11 percent over the last 12 months.

Airline fares dropped nearly 4 percent in October and decreased nearly 6 percent over the last 12 months. Motor fuel costs decreased for the first time in 3 months, dropping 1.5 percent. In the last 12 months, motor fuel costs plummeted more than 17 percent.

Entertainment costs also showed a slight decrease in October, dropping less than 1 percent, but increasing 6 percent over the past 12 months.

Intracity public transportation, other intercity transportation and food and beverages away from home showed slight increases in October.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

## *Vacation Travel Remains Stable in 1990*

Vacation travel remained stable in 1990 after increasing 6 percent in 1989, according to the Data Center's *1990 National Travel Survey Full-Year Report.*

The duration of vacation travel continued to decline in 1990, as the average length of a vacation decreased from 4.7 nights in 1989 to 4.6 nights in 1990. The average round-trip distance of a vacation trip also declined in 1990, decreasing from 940 round-trip miles in 1989 to 880 round-trip miles in 1990.

Eighty percent of all vacationers in 1990 used the automobile as their primary mode of transportation, 15 percent used air, and 2 percent traveled by train. More than 43 percent of all vacationers visited friends and relatives in 1990, while 42 percent stayed in a hotel or motel.

Among the information contained in the 1990 Travel Market Report are statistics on auto and air travel, hotel/motel use, travel by various age groups and a breakdown of vacation, pleasure, weekend and business travel by residents of the United States.

The statistics come from the Data Center's National Travel Survey, annually based on a telephone survey of 18,000 U.S. adults. The report can be purchased for $165 by contacting the Data Center at (202) 293-1040.

Proprietary custom questions may be added to the NTS and special tabulations of the data base are also available by contacting Elizabeth Stewart, manager of market research. *(Data Center members have been sent a complimentary copy.)*

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### *Frequent Business Travelers Decline in 1990*

Frequent business travelers comprised the most influential segment of the 1990 business travel market, with only 14 percent of all business travelers taking more than half of all business trips in 1990, according to the Data Center's *1990 Survey of Business Travelers.*

The report, which is sponsored by the Official Airline Guides (OAG), said that even though the number of frequent business travelers declined in 1990, the number of trips they took rose from 73 million in 1989 to 79.6 million in 1990.

The number of "frequent" business travelers, those taking 10 or more business trips per year, dropped to 4.9 million frequent business travelers in 1990, compared to 5.2 million in 1989.

The average frequent business traveler took 16.1 business trips in 1990, nearly 12 more trips than the average business traveler.

Compared to less frequent business travelers, frequent travelers are much more likely to be male, married and 35-44 years old. The majority of this segment have higher education and occupation levels and higher household incomes than less frequent travelers.

A frequent business traveler's typical trip is more likely than a less frequent traveler to involve no overnight stay and less likely to last more than 3 nights. It is also significantly less likely to be combined with vacation. In addition, frequent business travelers are less likely to attend a meeting, convention or trade show.

A total of 35.1 million U.S. adults took one or more business trips in 1990, a more than 1 percent increase over 1989. At the same time, these travelers took 8.3 percent fewer business trips than in 1989, according to the report.

*The Survey of Business Travelers* has tracked the growth and characteristics of U.S. business travelers on a monthly and annual basis since 1986.

*The SBT* includes an overview of business travel, characteristics of business trips, a profile of business travelers, purpose of trips, modes of transportation and accommodations. Segments covered in the report include women business travelers, business car rentals, frequent travelers and airline travelers, among others.

*The 1990 Survey of Business Travelers* is available for $85 by contacting the Data Center at (202) 293-1040. *(Data Center members have been sent a complimentary copy.)*

**Visitor Volume at National Parks**

| Region | September 1991 Visits | % Change from 1990* | Year to Date % Change* |
|---|---|---|---|
| NEW ENGLAND | 1,548,518 | -13.7% | -16.7% |
| MIDDLE ATLANTIC | 2,749,606 | -0.3 | 7.7 |
| SOUTH ATLANTIC | 7,491,381 | 0.4 | -0.8 |
| EAST SOUTH CENT. | 1,740,082 | 4.2 | 5.0 |
| EAST NORTH CENT. | 643,523 | 3.4 | 9.7 |
| WEST NORTH CENT. | 1,028,635 | 5.3 | 8.2 |
| WEST SOUTH CENT. | 731,355 | -2.5 | -2.2 |
| MOUNTAIN | 5,244,467 | 8.9 | 2.8 |
| PACIFIC | 4,958,184 | 3.9 | 2.6 |
| TOTAL | 26,135,751 | 2.0 | 1.3 |

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: **New England:** Conn., Maine, Mass., N.H., R.I., Vermont. **Middle Atlantic:** N.J., N.Y., Penn. **S. Atlantic:** Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. **East South Central:** Ala., Ky., Miss., Tenn. **East North Central:** Ill., Ind., Mich., Ohio, Wis. **West North Central:** Iowa, Kan., Minn., Mo., Neb., N.D., S.D. **West South Central:** Ark., La., Okla., Texas. **Mountain:** Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. **Pacific:** Alaska, Calif., Hawaii, Ore., Wash.

### *Travel Review Conference Set for February 5, 1992*

The 6th annual Travel Review Conference will be held on February 5, 1992 at the Holiday Inn Crowne Plaza in Arlington, Virginia.

The conference is sponsored by the U.S. Travel Data Center, Travel and Tourism Research Association (TTRA), the Washington Metropolitan Chapter of TTRA and the United States Travel and Tourism Administration (USTTA).

An uncertain economy, loss of consumer confidence, war, recession and a rapidly changing consumer marketplace dramatically reconfigured the travel industry in 1991.

The 1992 Travel Review Conference will provide timely analysis of the short and long term impacts of the Gulf War and recession on domestic and international travel across major industry sectors.

The program will include sessions on the war and [illegible] travel and ethnic travel. In addition, Suzanne Cook, executive director at the Data Center, will review domestic travel in 1990 and Harvey Shields, director, office of research at USTTA, will provide information on international tourism.

Registration before January 10 will cost $170 for TTRA/USTDC members, $190 for non-members and $100 for students. Registration after January 10 will cost $210 for everyone. The conference is limited to 400 attendees so early registration is strongly advised.

Please make checks payable to TRC '92 and mail to: TLC, Inc. - West, 8 Second Avenue SW, Ronan, MT 59864. For additional information, call the conference hotline at (406) 676-WEST.

# Current Travel Indicators - 1990/91

| | Month | Value | Units | Percent Change Last Month | Year Ago | Year To Date |
|---|---|---|---|---|---|---|
| **Establishment Receipts or Retail Sales** | | | | | | |
| Hotels, Motels, Other Lodging Places(1) | Aug | $5,759 | million | 5.1 | 3.9 | 1.1 |
| Eating and Drinking Places(2) | Oct | $15,918 | million | 1.0 | 4.9 | 3.9 |
| Gasoline Service Stations(2) | Oct | $10,507 | million | -1.1 | -13.9 | 0.2 |
| **Commercial Lodging Demand** | | | | | | |
| Hotel/Motel Occupancy Rates(3) | Aug | 62.5 | percent | 1.8 | -1.0 | -2.3 |
| Real Demand for Commercial Lodging(4) | Aug | 71.9 | million | 4.1 | 2.9 | 0.3 |
| **Airline Passenger Traffic (5)** | | | | | | |
| Domestic Revenue Passenger-Miles | Oct | 27.4 | billion | 7.4 | -2.4 | -2.9 |
| Int'l Revenue Passenger-Miles | Oct | 10.3 | billion | -6.1 | 9.3 | -3.0 |
| **Highway Traffic Volume (6)** | | | | | | |
| Rural Arterial Passenger-Miles | Sept | 45.4 | billion | -13.6 | 1.9 | 0.6 |
| **Rail Passenger Traffic (7)** | | | | | | |
| Amtrak Passenger-Miles | Oct | N/A | | | | |
| **Travel Price Index** (1982 - 84 = 100) (8) | Oct | 145.1 | | 0.4 | 3.1 | 7.6 |
| **Visitor Volume at National Park Service Areas (11)** | | | | | | |
| Recreation Visits | Sept | 26,135,751 | | -33.0 | 2.0 | 1.3 |
| Overnight Stays | Sept | 1,982,510 | | -45.0 | -3.2 | 4.1 |
| **Foreign Arrivals to the U.S.** | | | | | | |
| From Overseas(12) | June | 1,451,288 | | 3.7 | 5.1 | 2.2 |
| From Canada(13) | Sept | 1,561,091 | | -45.0 | 0.7 | 10.0 |
| From Mexico(12) | June | 120,201 | | 7.8 | 8.6 | 3.7 |
| **U.S. Citizen Departures** | | | | | | |
| To Overseas(12) | Jan | N/A | | | | |
| To Canada(13) | Sept | 1,171,367 | | -48.2 | -7.2 | -1.5 |
| **Domestic Demand for Gasoline** | | | | | | |
| Barrels/Day(14) | Sept | 7,198 | thousands | -4.7 | 4.1 | -0.7 |

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary, revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1988 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary, revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary, unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary, Source: U.S. Department of Energy.

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